**Search and Filtering Usability Testing Discussion Guide**

**Intro - 5 minutes**

Thanks for joining us today! My name is Amy and I also have some colleagues on the line observing and taking notes. Today we're going to take a look at the GI Bill Comparison Tool. Specifically, we're looking at how to calculate your GI Bill benefits for institutions and programs within the Comparison Tool.

Before we get started, a few things I want to mention:

* This entire session should take about 30 minutes. I don't want to keep you much longer than that, so I may occasionally prompt you with the next question or topic.
* During this session, we want to hear your honest opinions. We're not testing your ability. We just want to improve these tools to better meet Veteran's needs. I won't be offended by any opinions you express and welcome your feedback.
* If for any reason and at any time you want to stop the session, please let me know.

Are you comfortable if I record the screen and audio as we talk today? We use the recordings to confirm that we have captured your opinions accurately. The recordings are deleted after we finish analysis, and none of your comments will be attributed to you directly.

* If yes: Great - thank you. Once I start recording, I'll ask again so we have your audible confirmation.
* If no: Ok. My team will just observe and take notes as we go.

Start recording.

* I have started recording. I'd like to confirm: Are you comfortable if I record my screen the audio as we talk today?

He’s using iOS on a mobile phone. Uses Safari and Chrome, mostly Safari.[was on ipad, A had him switch to portrait mode]

**Mobile**

iOS Screen Sharing: <https://support.zoom.us/hc/en-us/articles/115005890803-iOS-Screen-Sharing>

Link 2: <https://it.umn.edu/services-technologies/how-tos/zoom-share-computer-sound-during-screen#Sharing-iOS-Zoom-App>

**Warm-up Questions - 5 minutes**

Before we look at the website, let’s start with a few warm-up questions.

1. Are you currently using or planning to use your GI Bill education benefits in the next few months? P: I’m currently using.

* Currently using: When did you start school? P: In May this year. Where are you going to school? P: University of Maryland College Park.
* Planning to use: Are you looking at any particular schools? P:

1. Have you ever used the GI Bill Comparison Tool before? P: Yeah, I used it in my search back in February.

* If yes, fantastic!
  + When do you think the last time you used it was? P:
* If no, no worries. We're checking that out today and always appreciate getting a fresh perspective on it.

For our session today, I'm going to give you a couple tasks to do online. While you're going through them, it would be really helpful if you'd think aloud - kind of like you'd do if you were talking to yourself. We are interested in your first reactions, what you're thinking & wondering as you go through the process. The more you say about what you are thinking and wondering, the more we’ll learn.

When you think aloud, it helps us understand what works well and where we might want to make improvements to make things even easier. If you have questions, it’s likely that many other Veterans will, as well, so feel free to ask them along the way.

I'm going to give you control of my screen & mouse. I'll pass control to you and you should receive a message that prompts you to control the screen.

**Option 1**

**First Task: Finding Schools and Filtering - 15 minutes (Staging)**

**Part 1**

Let's go back and time and pretend that you are considering attending **Participant-Named University** and are curious if the Comparison Tool has information on that school. How would you find out what information the Comparison Tool has on that school?

P:

Things to watch for:

* Does the user use the autocomplete functionality or search?
* How many times does the user adjust their search criteria before they get what they want?
* How does the user change their search?

**Part 2**

Upon additional research into said school, you decided that the school wasn't for you. However, you really like the area and are curious what other options are available to you. How would you go about identifying other schools in that area?

P:

Things to watch for:

* How does the user change their search?
* Does the user change the filters?
  + If yes, which ones?
* How many times does the user adjust their search criteria before they get what they want?
* Does the user open the additional information components? If yes, which ones?

Upon completion of the task:

* How did you think that went? P:
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task? P:
* What did you think of the filters? Which ones would be most useful to you? P:

**Part 3**

Of the filter options for religious affiliation, special mission and gender, which ones would you be most likely to use?

P:

You've just learned that you received a scholarship for any school in Georgia that is **Insert preferred filter option**. How would you go about finding schools that meet that criteria?

P:

Things to watch for:

* How does the user change their search?
* Does the user change the filters?
  + If yes, which ones?
* How many times does the user adjust their search criteria/filters before they get what they want?
* Does the user find what they want on the search results page or do they go to the school profile page?
* Does the user open the additional information components? If yes, which ones?

Upon completion of the task:

* How did you think that went? P:
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task? P:
* What did you think of the filter tags? Which filters do you think have tags? P:

**Switch environments**

**Second Task: Acronym School and Filtering - 10 minutes (Production)**

**Part 1**

Let's say you've heard good things about the programs at MIT, otherwise known as Massachusetts Institute of Technology. How would you go about finding that school on the Comparison Tool?

P:

Things to watch for:

* Does the user use any filters or change their search criteria?
* What, if any, filters do they use?
* Did the user input the acronym for MIT? If so, how did they react to the results?
* How many times does the user adjust their search criteria before they get what they want?

**Part 2**

You like MIT, but have some concerns over expenses. You would like to broaden your search to any schools in Massachusetts that are Public Institutions and have the Yellow Ribbon program. How would you go about doing this?

P:

Things to watch for:

* Does the user use any filters or change their search criteria? P:
* What, if any, filters do they use? P:
* How many times does the user adjust their search criteria before they get what they want? P:

**Part 3**

Let's say you've recently moved to the upper east side of Manhattan in New York City. You don't have a car and would like to either bike or walk to school if possible. How would you find out what schools are in your area?

P:

Things to watch for:

* Does the user use any filters or change their search criteria?
* What, if any, filters do they use?
* How many times does the user adjust their search criteria before they get what they want?

Upon completion of task:

* How did you think that went? P:
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task? P:

**Option 2**

**First Task: Finding a School and Filtering - 10 minutes (Production)**

**Part 1**

Let's go back and time and pretend that you are considering attending **Participant-Named University** and are curious if the Comparison Tool has information on that school. How would you find out what information the Comparison Tool has on that school?

A: were you looking at any other schools other than UMCP?

P: Yeah, I was looking at George Mason University, Georgetown, all the schools in DC.

A: which would be your favorite?

P: Probably Georgetown. [started running through questions]… Initially when I looked, I was looking at in person and online. School, I’d type Georgetown. [picked Georgetown university from list] the first one here is the one I wanted to pick [in SRP]. The military status didn’t stay the same. I clicked on 70%. That didn’t transfer over. [switched it from 100% to 70%]. Nothing happened there.

A: you clicked update benefits and nothing happened?

P: yeah, nothing happened….17,000 is paid to the school. 15,000 is paid to me. I’m kind of confused. The out of pocket tuition is 35,000 incorporating the 70%... Those type of questions come to mind.

A: [had him to back to srp] was it easy or difficult to get to this page?

P: it was super easy to get to Georgetown. It brought up the results. For the georgetowns, I’m really focused on the one that I wanted to look at. I’m only interested in this school compared to the other schools. I was just saying it was giving me too much information at this stage. I was just looking at Georgetown university

A: and it was giving you the various schools under Georgetown as well.

P: yeah.

A: in terms of finding Georgetown on a scale of 1 to 5, what rating would you give this task?

P: 5.

A: if you scan down the page, I’m curious, on the left hand side, do any of those options look interesting to you or useful?

P: the only one that sticks out to me is yellow ribbon. I’m not sure what the other ones are. Im not sure what the filters are for or if it’s going to filter out at this point. If I were to click on yellow ribbon, nothing changes. Is it saying that the yellow ribbon benefits apply to this school?

A: ok, so some curiosity about what those actually do.

P: yeah. What they do and what they actually are. I am a veteran and I did deploy and I do qualify for a lot of benefits, but I don’t know which of those apply to me. I do know I qualify for the yellow ribbon, but I don’t know how to apply it on this search.

Things to watch for:

* Does the user use the autocomplete functionality or search?
* How many times does the user adjust their search criteria before they get what they want?
* How does the user change their search?

**Part 2**

Upon additional research into said school, you decided that the school wasn't for you. However, you really like the area and are curious what other options are available to you. How would you go about identifying other schools in that area?

P: …I would just change the name from Georgetown, and I’d look at George mason, and it populated the school I was looking for, which is perfect. It shows me exactly the one I want. So yeah, the school I was looking for came up.

Things to watch for:

* How does the user change their search?
* Does the user change the filters?
  + If yes, which ones?
* How many times does the user adjust their search criteria before they get what they want?
* Does the user open the additional information components? If yes, which ones?

Upon completion of the task:

* How did you think that went? P:
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task? P:
* What did you think of the filters? P: Which ones would be most useful to you? P:

**Part 3**

Have you ever considered going to a school that was gender-exclusive, had a religious affiliation or special mission (like Historically Black colleges)?

P: yeah. I considered howard university

A: how would you go about searching for that?

P: howard university is the first option

A: how did you think that process went?

P: real simple. It was really easy. Like all the schools I was looking for, I’ll look for one that was out of state. Morehouse college. It’s very simple and easy to do.

* If yes, have you ever conducted a search for those? What did you do? P:
* If not, how would you go about searching for schools like that? P:

Things to watch for:

* Does the user look for any filter options to help them with these?

**Switch environments**

**Second Task: Acronym School and Filtering - 10 minutes (Staging)**

**Part 1**

Let's say you've heard good things about the programs at MIT, otherwise known as Massachusetts Institute of Technology. How would you go about finding that school on the Comparison Tool?

P: I would just type in MIT and see if it comes up, and it doesn’t so then I’d go back and be more specific. And it’s an option [in pick list] click it, and then yep. So it came up, but on a scale of 1-5, that would be a 4 because everyone else knows MIT but that common name wasn’t an option initially.

A: alright.

P: another one is Famu. Same thing. I’d have to type in specifics.

A: famu? What happens? Can you just show me if anything comes up?

P: yep, it actually does come up.

A: that’s good to know. Thanks for humoring me. Let’s go back to MIT because I want to ask you a particular question about that one.

P: it didn’t work for MIT.

A: it did not.

Things to watch for:

* Does the user use any filters or change their search criteria?
* What, if any, filters do they use?
* Did the user input the acronym for MIT? If so, how did they react to the results?
* How many times does the user adjust their search criteria before they get what they want?

**Part 2**

You like MIT, but have some concerns over expenses. You would like to broaden your search to any schools in Massachusetts that are Public Institutions and have the Yellow Ribbon program. How would you go about doing this?

P: you said that are in Massachusetts that is a yellow ribbon? I’d click on Massachusetts and I’d click on…, but I’d also delete [deleted search term]. As far as public universities, I don’t see a public or private option.

Things to watch for:

* Does the user use any filters or change their search criteria?
* What, if any, filters do they use?
* How many times does the user adjust their search criteria before they get what they want?

**Upon completion of task:**

* How did you think that went? P: I’d give it a 5…. Very easy.
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task? P:

**Part 3**

Let's say you've recently moved to the upper east side of Manhattan in New York City. You don't have a car and would like to either bike or walk to school if possible. How would you find out what schools are in your area?

P: I would type New York. I don’t even know if I’d be specific. Maybe I’d say Manhattan. And then I’d put New York [in state dropdown]. I’d take off Yellow Ribbon. That would be my first one to see with the title of manhattan. That went fine. I just don’t, looking at the information, I don’t know if the information is beneficial because there aren’t any gi bill students in the bottom two, and the top one is a community college. So I would take out manhattan and just look in the state of new York. If there was no option to refine in the state of new York, I’d just scroll through. Did we say just new York?

A: also manhattan

P: too many options to scroll through. I’d go to google

A: what kind of options would you be looking for in google?

P: [would search for names of schools in manhattan]

A: so you’d get the names of the schools in google and come back here to get the information?

P: correct.

A: what kind of information do you think you’d be getting in google?

P: I think I’d be getting a lot of options. Sometimes google’s not very specific, but I would expect a list.

A: ok. So you’d expect google to come back with answers for you.

*Prompt after user tells what they would do* Let's say your ZIP code is 10021. Would that help your search?

P:

Things to watch for:

* Does the user use any filters or change their search criteria?
* What, if any, filters do they use?
* How many times does the user adjust their search criteria before they get what they want?
* Does the user try the zip code after being prompted?

**Upon completion of task:**

* How did you think that went? P: it’s almost like you have to get the information somewhere else, so it’s not really helpful. As far as that search, because I didn’t have the information, it made the search harder.
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task? P: I don’t know if I should be upset with myself or with the tool with that one, but I’d rate it a 3.

**Post-Task Interview - 5 minutes**

Those are all the tasks I have for you today.

* Do you have general thoughts or feedback on the Comparison Tool that you’d like to share? P:
* Any questions for me? P:
* I want to give a chanced to the other people on the line to ask a question.

CC: you said you were interested in in person and online classes. how would you change to online only from this page? [he couldn’t find the option in the srp, so he went back to the landing page, and said he’d do it there. he thought in person and online would include both in person and online options]

CC: On the search results page, are there other filters that would be helpful for you to see? Size, pop. of school, search based on degree you’re looking for [mba program -categories for degrees], also accreditations, or community college vs. other types of schools/degree types [associate’s, bachelor’s, master’s, phd]

JJ: [asked about his experience with the CT. He walked through what he was looking for at the time]

**Thank-You and Closing - 3 minutes**

Well we really appreciate you taking the time to share your thoughts with us today. Your feedback is so helpful to us as we continue to work on the site and make sure it really works for Veterans.

Thanks! Lastly, do you know any other Veterans, caregivers, or service members who might be willing to participate in a future user research session? If Yes: Thank you! I'll have our team send you an email with a little blurb that you can pass along.

Great, thanks so much and enjoy the rest of your day!